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**Racial Equity Framework: Racial Equity Audit**

**Guidelines and Application**

# **Mission and Vision**

The Community Foundation for Loudoun and Northern Fauquier Counties was founded in 1999 to benefit the towns, countryside, and citizens of Loudoun and Fauquier Counties and surrounding areas.

# **About the Donors**

Funding for the Racial Equity Audit program is made possible by the County of Loudoun, Kaiser Permanente, and Wells Fargo as part of the Community Foundation’s Racial Equity Framework program, launched in 2020.

## **Racial Equity Audit ~ 2020**

The Community Foundation now offers 2-3 nonprofit organizations the opportunity to undertake a Racial Equity Audit. Selected organizations will work with consultant Tamara Copeland to review and assess organizational norms, systems, policies, and practices, that will culminate in a report with observations and recommendations as they pertain to organizational goals of racial equity. This audit is intended to reveal the invisibility of disparate treatment of people of color, the potential role of the participating organizations in maintaining that reality, and to shape a course toward more equitable treatment and, hopefully, more equitable outcomes for the individuals served by our nonprofit community. Selected organizations will be required to contribute $250 of the consulting fees for these professional services valued at approximately $4,500 per organization.

Tamara Lucas Copeland has more than 30 years of executive leadership experience. She knows how to lead a nonprofit organization to effectively address its mission. She has also worked in government, at the local, state, regional and national levels. She recognizes that leadership is not a solo undertaking but work that involves partnerships. She knows that leadership does not always happen visibly from the front, but often occurs as part of a collaboration or as a backroom facilitator/stage setter/cheerleader for change. Over the last three years, Copeland has focused extensively on racial equity. She envisioned and led a groundbreaking initiative at the Washington Regional Association of Grantmakers to educate and empower the local philanthropic sector to address racial inequity. The initiative, “Putting Racism on the Table” received significant positive recognition locally and nationally and has been attributed with jumpstarting racial equity work in the region and in other parts of the country. She is also the author of *Daughters of the Dream: Eight Girls from Richmond Who Grew Up in the Civil Rights Era*. This memoir chronicles the life of Copeland and seven of her friends as they negotiated, and continue to negotiate, race and racism in America. She also authors a monthly blog by the same title, www.daughtersofthedream.org that is intended to reveal how she experiences America as a Black woman.

**Program Design**

The Racial Equity Audit process will involve document review, interviews with key informants and a scan of how the organization is portrayed internally and externally. Following a preliminary meeting with the organization’s leaders, Ms. Copeland will begin a thorough review of documents provided by the organization. Documents that will be requested include, but are not limited to:

* Board and staff roster, by race, tenure and expertise/area of responsibility within the organization
* Board meeting minutes – last 12-18 months
* Personnel manual
* Description of process to secure Board members and to fill staff vacancies
* Procurement policy or description of how vendors for needed goods and services are selected
* Descriptions of current major bodies of work
* Copies of all public statements made in the last 12-18 months
* Strategic plan and/or annual workplan

Each document will be reviewed to determine if, and how, racial/ethnic differences are taken into account in addressing the needs of the organization and of the Loudoun community. For example, does the complement of staff reflect the racial/ethnic diversity of the county? How extensively do outreach efforts for staff and board reach into racially/ethnically diverse communities? What is the diversity of vendors? Are efforts made, in relation to the work/priorities of the organization, to directly address the needs of differing races/ethnicities in the county?

In addition to document review, Ms. Copeland will conduct a 1-2 hour, face-to-face interview with the following individuals at each participating organization:

* Executive Director (lead staff) of the organization
* Senior staffer leading a major initiative of the organization
* Senior staffer of a partner organization (no longer than 1 hour)
* 2-3 people benefitting from the service of the organization (no longer than 1 hour)
* The Board Chair
* A recently selected Board member

It is the goal that this complement of individuals will offer a 360-degree assessment of the organization. Ms. Copeland may also request brief, follow-up telephone interviews to clarify points in the interview if needed.

Once the document review and interview process is completed, a report will be submitted to the organization summarizing where the organization demonstrates racially equitable practices and policies, and how the organization is working to promote racial equity in their target communities. In addition, the report will provide recommendations for change as appropriate.

# **Eligibility Requirements for Applicant Organizations:**

* Must be a 501(c)(3) nonprofit public charity;
* Must serve Loudoun County in the human services sector; and,
* While not required, organizations that participated in The Onion Dialogues and/or Allyship workshops this year will be given priority.

**Commitments for Selected Organizations:**

* Selected organizations must pay a $250 consultant fee to the Community Foundation;
* Organizations must make available the organizational documents detailed above, as well as commit to completing the staff/Board interviews as described under Program Design;

# **Application Submission and Review**

Application and supporting documents must be **submitted electronically via email** to Nicole Acosta at nicole@CommunityFoundationLF.org **on or before January 8, 2021 5:00 p.m.** (subject line: Racial Equity Audit Application). The Community Foundation will accept applications on a rolling basis until the deadline; earlier submissions are encouraged.

##### **Program Timeline, Selection and Final Reporting**

Applications will be reviewed and selected by Community Foundation staff and Ms. Copeland. Selected organizations will be required to complete a program evaluation at the conclusion of the program. Program timeline is as follows:

* January 15, 2021 or earlier - Applicants notified of final selections; invoice sent to organizations for program fee
* January – May 2021 – Organizations complete document review and interviews with Ms. Copeland
* By June 2021 – Organizations receive final report and recommendations from Ms. Copeland and complete program evaluations.

### Application Instructions

An application should include the following components:

1. **Application Cover Form**
2. **Racial Equity Audit Application** (one-two pages total, not including cover sheet)

(3)  **Supporting Materials**—Please attach a copy of the following:

* Most recent Income Statement
* Most recent Form 990 or 990EZ
* Most recent audit, review, compilation, or financial statement
* IRS letter of determination

***Submit all application documents electronically via email by January 8, 2021 to:***

Nicole Acosta; [nicole@communityfoundationlf.org](mailto:nicole@communityfoundationlf.org)

Community Foundation for Loudoun and Northern Fauquier Counties

Subject Line: Racial Equity Audit Application

For more information or questions, call Nicole Acosta, Director of Grants and Nonprofit Programs at 703-779-3505, ext 3

**Racial Equity Audit**

**COVER FORM ~ 2020**

Organization \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Application Contact Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Contact Phone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contact Title\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Contact Email \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Organization Overview:**

\_\_\_\_\_ Yes, my organization addresses human service needs in Loudoun County.

Current Organizational Operating Budget: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

How many Board members does your organization currently have? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

How many paid staff does your organization have? Full-time\_\_\_\_\_\_\_\_ Part-time\_\_\_\_\_\_\_\_\_\_

How many times does your Board meet per year? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name/Email of Executive Director \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

What percentage of your board make financial contributions to your organization? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Did your organization participate in The Onion Dialogues and/or Allyships? Which dates did you attend?

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I certify that our Board and Executive Director have reviewed the Racial Equity Audit application, including the program commitments required.

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Executive Director Signature Board Chair Signature

**Racial Equity Audit Application**

**APPLICATION ~ 2020**

(Completed application should be between one-two pages total, not including cover page and attachments)

1. **What is your organization’s mission and vision statement?**
2. **Briefly describe your organization’s history and overall programs, including when founded, staffing/volunteer structures, and a description of programs and services provided specifically in Loudoun County.**
3. **Describe any past or current initiatives your organization has taken to address racial equity, diversity, and/or inclusion and the general audience or clientele you serve?**
4. **Describe the specific goals your organization would like to achieve or areas you’d like to address by participating in the Racial Equity Audit.**